Statement of Work

**City of Boston
Improving Online Permitting & Licensing**

April 10, 2015

Version 2.5

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TABLE OF CONTENTS

_Document Control

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01/26/15	OpenCounter	2.0	Refinements
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INTRODUCTION

Overview

This Statement of Work ("SOW") sets forth a scope and definition of the consulting/professional services (collectively, the "Services") to be provided by Accela, Inc. and its subcontractor Open Counter Enterprises Inc. ("Accela/OpenCounter") to the City of Boston ("City") in conjunction with the implementation of the OpenCounter permitting software ("Software") in the form of a software-as-a-service (the "OpenCounter Software/services") to be provided by Accela/OpenCounter in response to DoIT-EV00001595.

The City has selected Accela/OpenCounter to implement the OpenCounter Software/services to create an online permitting and licensing portal for the City ("Boston Permitting Portal") to improve and enhance its permitting and licensing capabilities that will integrate with existing City back office core technologies. Over the course of thirty six (36) month period from the signing of the contract, Accela/OpenCounter will implement the current version of OpenCounter Software/services to be followed by subsequent, enhanced versions of the OpenCounter Software/services. Such enhanced versions of the OpenCounter Software/services will include additional features and functions resulting from OpenCounter product roadmap based on the needs of various users of the City's permitting and licensing services ('Permit Applicants"). The Permit Applicants include: Prospective business owners, Homeowners, Tradespeople, Administrative Staff and Executive Staff.

Accela/OpenCounter will work closely with City staff to identify the needs of Permit Applicants and to implement solutions that streamline and enhance their interaction with various permitting and licensing procedures.

Critical Success Factors

In order to successfully execute the services described herein, there are several critical success factors for the project that must be closely monitored and managed by the stakeholders. These factors are critical in setting expectations between the City and Accela/OpenCounter, identifying and monitoring project risks, and promoting strong project communication.

- **Dedicated City Participation** – The Boston Permitting Portal is a complex project involving multiple departments across the City. It is critical that City staff are engaged throughout the project in order ensure successful outcomes. It is also important that stakeholder roles are defined so that decisions can be made effectively and efficiently during the execution of the project. The Department of Information Technology ("DoIT", "Agency") will serve as the project sponsor and will appoint a project owner ("Project Owner") as the key executive for this project, and a project manager ("Project Manager") to facilitate. Accela/OpenCounter will work with the project sponsors and department leaders to determine appropriate team member involvement. Involvement could range from a full-time capacity, during early analysis meetings, to part-time during the technical implementation phase. The following City departments comprise the organization scope of the implementation and integration described herein:
    - Department of Information Technology ("DoIT")
    - Department of Neighborhoods Development ("DND")

- Inspectional Services Department ("ISD")
- Boston Fire Department ("BFD")
- Department of Parks and Recreation
- Boston Redevelopment Agency ("BRA")
- Department of Public Works ("DPW")
- Department of Special Events
- Boston Transportation Department ("BTD")

- **Project Governance-**The successful management and implementation of a project of this size and complexity requires strong management communication through weekly check-ins, routine on-site visits and feedback sessions with City stakeholders.
- **Methodical Releases-**For technology projects such as the Boston Online Permit and Licensing Service, Accela/OpenCounter will implement each phase in a methodical and controlled fashion to help verify that a mission-critical application is functioning at the highest possible qualitative and performance standards before being implemented for additional phases. We perform extensive testing, quality assurance reviews, training and change management throughout the project lifecycle to help ensure that users are ready for and satisfied with the new system to be implemented.
- **Knowledge Transfer** –The goal of the project is to build a Permitting Portal that will be easy for citizens to use, and for City staff to administer. It is critical that City personnel participate in the design review process, testing and training sessions.

Key Deliverables and SCOPE of Services

The following section describes Accela/OpenCounter methodology, the activities and tasks that will be executed to meet the City's objectives and requirements for this project, the anticipated deliverables and the associated assumptions.

Approach and Methodology

The Boston Permitting Portal will be deployed in 4 phases over 24 months, followed by a 12 month maintenance and technical support period. During the term of the contract, Accela/OpenCounter will host and maintain the Boston Permitting Portal, and will cover all costs associated with the service. Accela/OpenCounter will provide ongoing project management throughout the implementation in order to plan and monitor execution of the project in accordance with the activities outlined in this Statement of Work. Each implementation phase will consist of the following milestones:

1, Project Initiation. The Accela/OpenCounter team will leverage the Statement of Work to refine the project management plans, validate project scope, and work with the City to finalize the baseline schedule, identify resources to be assigned to the project and conduct a kick-off for the implementation phase

2, Application Wireframes. Accela/OpenCounter will present application wireframes to communicate planned layout and functionality of the implementation phase

3, Prototype Deployment. Accela/OpenCounter will deploy a prototype of the service on a dedicated development URL for testing and analysis.

4, Acceptance Testing The prototype deployment will be fully tested by Accela/OpenCounter and by the City project team (according to the procedures defined in the Acceptance section). All "Critical" and "Major" issues will be resolved. At the conclusion of this Stage, the City will accept the prototype deployment.

5, Production Deployment. After the acceptance tests have been approved by the City, the prototype deployment will be migrated to the production environment and made available for public access. City staff will be trained on the operation of the product (see Training).

6, Post-Launch Product Iteration & Enhancements. For a period of thirty (30) days after the Production Deployment, Accela/OpenCounter will refine the product in response to feedback from stakeholders and Project Staff. This period will be followed by on-going maintenance and support throughout the term of the contract (see Maintenance & Technical Support).

deliverables

Phase	Milestone	Deliverables
Phase I-Business Portal	Begin work on Business Portal and deploy boston.zoningcheck.com and boston.zoning.io	-Project Management Plan uploaded to Basecamp.
	Deliver wireframes	Wireframes (PDF)
	Deliver user interface designs	-Interface Designs (PDF)
	Prototype Deployment & Acceptance Testing	-Configuration of a prototype deployment of the Accela/OpenCounter Software/services on a dedicated development URL. Test results for systems and integration testing -Test results for Performance Testing -Test results for User acceptance Testing
	Beta Launch	-Configuration of OpenCounter front end -Support for initial applications of subset of license types via the Hansen / Boston API -Invoice Cloud integration

	Public launch of Portal	-End User Training in person End User Training on-line Conference -End User Quick Reference Guide -go-live
Phase II-Homeowner Portal	Begin work on Homeowner Portal	-Project Management Plan uploaded to Basecamp.
	Deliver wireframes	Wireframes (PDF)
	Deliver portal design	- Interface Designs (PDF)
	Prototype Deployment & Acceptance Testing	-Configuration of a prototype deployment of the Accela/OpenCounter Software/services on a dedicated development URL. Test results for systems and integration testing -Test results for Performance Testing -Test results for User acceptance Testing
	Public Launch of Portal	-End User Training in person -End User Training on-line Conference -End User Quick Reference Guide -go-live
Phase III-Building Professional Portal	Begin Work on Building Professional Portal	-Project Management Plan uploaded to Basecamp
	Deliver wireframes	Wireframes (PDF)
	Deliver portal designs	- Interface Designs (PDF)
	Prototype Deployment & Acceptance Testing	-Configuration of a prototype deployment of the Accela/OpenCounter Software/services on a dedicated development URL. Test results for systems and integration testing -Test results for Performance Testing -Test results for User acceptance Testing
	Public Launch of Portal	-End User Training in person - End User Training on-line Conference -End User Quick Reference Guide -go-live
Phase IV-Special Events Portal	Begin Work on Special Events Portal	-Project Management Plan uploaded to Baecamp
	Deliver wireframes	Wireframes (PDF)
	Deliver portal designs	- Interface Design (PDF)

	Prototype Deployment & Acceptance Testing	-Configuration of a prototype deployment of the Accela/OpenCounter Software/services on a dedicated development URL. Test results for systems and integration testing -Test results for Performance Testing -Test results for User acceptance Testing
	Public Launch of Portal	-End User Training in person - End User Training on-line Conference -End User Quick Reference Guide -go-live
Phase I-IV	Maintenance and Support	- Maintenance and Support -Content Updates -Content Updates translated in six supported languages-Spanish, Mandarin Chines, Haitian Creole, Cape Verdean Creole, Vietnamese and Portuguese -Security Audit annually 2015,2016,2017

Products
The following list items represent the products are in scope for this Project:

- Accela/OpenCounter permitting software ("Software") in the form of software-as-a-service of "Software/services"

Phases
The service is delivered in four phases. A description of the phases is listed below. The permits will be enabled in (3) tiers per phase as outlined in the RFP. Permit integration will be executed based on permit availability through Hansen API. See Appendix B- System Interface and Permit Integration Schedule.

Phase I - Business Portal

Overview

Phase I of the Accela/OpenCounter Service will include Accela/OpenCounter's licensing and permitting portal for prospective business owners ("Business Portal").
During Phase I, Accela/OpenCounter will also configure boston.zoning.io with land use codes, zoning districts and clearances to enable boston.zoningcheck.com as a stand-alone lookup utility.

The Business Portal will use content from the Inspectional Services Department ("ISD"), Boston Fire Department ("BFD"), Boston Redevelopment Agency ("BRA"), Department of Neighborhood Development ("DND"), Public Works Department ("PWD"), Consumer Affairs and Licensing, and the Mayor's Licensing Division to provide prospective business owners with an overview of the costs, timelines and requirements associated with starting a new business.

Permit Applicants will be guided through a permit discovery process that is tailored to their specific permitting needs, based on information that they have supplied to the system. The Business Portal will cover requirements for specific business licenses, permits related to the physical alteration of commercial spaces, and zoning and occupancy reviews. At the end of the process, applicants will be prompted to submit an application for the triggered licenses and permits (and pay via InvoiceCloud). Once submitted, OpenCounter will push the applicant data through the Hansen API to initialize new records in the Hansen system.

As the permit applications are processed, milestone updates will be pushed from Hansen and displayed in the Business Portal in an intuitive user dashboard. Milestone updates and alerts will also be delivered via email. Once issued, applicants may print their permits through the Business Portal.

In the administrative interface, admin users will be presented with a dashboard of applicant activity, including new businesses started, jobs created, applications submitted, and other relevant indicators of economic and administrative performance. Administrative staff will have the ability to view individual applications, review permit status, and respond to applicant help requests. They will also have access to content management functionality to customize the Business Portal content and interface. The administrative section will include a robust user management system that will allow super-users to assign roles and responsibilities to other administrative users.

The Business Portal will be deployed at permits.cityofboston.gov, with integrations into the following departmental pages and sites:

- Department of Neighborhood Development (primary deployment)
- City of Boston website - business section (links / banners)
- Inspectional Services Department (links / banners)
- Boston Fire Department (links / banners)

The following permits will be enabled as a part of the Business Portal:

Phase I-Business Portal		
Tier I	Tier 2	Tier 3
● Amendment to a Long Form	● Bath and Massage Establishments	● BFD General Permit

● BFD Chemist Certificate Process	● BFD Annual Inspection Business	
● BFD Construction, Demolition, Renovation	● BFD Annual Permit	
● BFD Fire Alarm Installations	● BFD Exhaust Hood for Certified	
● BFD Smoke/Carbon Monoxide Inspection	● BFD Laboratory Registration	
● BFD Sprinkler System	● BFD License Registration Cert	
● BFD Temporary Dumpster	● BFD Place of Assembly	
● BFD Temporary Place of Assembly	● BFD Quarterly Inspection	
● Board of Appeals	● BFD Self-Service Fuel	
● Certificate of Occupancy	● Certificate of Inspection	
● Electrical Fire Alarms	● Facade Affidavit	
● Electrical Low Voltage	● Fire Escape Affidavit	
● Electrical Permit	● Food Services	
● Gas Permit	● Funeral Establishment	
● Long Form/Alteration/Change of Occupancy	● Licensing Board Application	
	● Licensing Board Change Application	
● Plumbing Permit	● Loading Zone Permit	
● Short Form Bldg Permit	● Newsbox Permit	
● Sidewalk Deposit	● Pool/Roof/Ceiling	
● Use of Premises	● Recreational Camps	
	● Swimming Pools	
	● Valet Parking Permits	

Phase II - Homeowner Portal

Overview

The second implementation phase will be a version of the Accela/OpenCounter Service that includes, in addition to the Business Portal, a licensing and permitting portal for homeowners ("Homeowner Portal").

The Homeowner Portal will use content from ISD, BFD, BRA, DND, PWD, and BTD to provide Permit Applicants with an overview of the costs, timelines and requirements associated with a home renovation, alteration or addition project, including non-structural additions such as deck and fences.[1]

Permit Applicants will be guided through a permit discovery process that is tailored to their specific permitting needs, based on information supplied to the system. The Homeowner Portal will educate homeowners on the steps required to be in compliance with City regulations, including zoning and occupancy reviews, design reviews, and construction-related permits. At the end of the process, Permit Applicants will be prompted to submit an application for the triggered licenses and permits (and pay via InvoiceCloud). Once submitted, application data will be pushed through the Hansen API to initialize new records in the Hansen system.

As the permit applications are processed, milestone updates will be pushed from Hansen and displayed in the Homeowner Portal in an intuitive user dashboard. Milestone updates and alerts will also be delivered via email. Once issued, applicants may print their permits through the Homeowner Portal.

In the administrative interface, admin users will be presented with a dashboard of applicant activity, including the number of new construction projects, applications submitted, and other relevant indicators of construction activity and administrative performance. Administrative staff will have the ability to view individual applications, review permit status, and respond to help requests from Permit Applicants. They will also have access to content management functionality to customize the Homeowner Portal interface. The administrative interface will include a robust user management system that will allow super-user admins to assign roles and responsibilities to other administrative users.

The Homeowner Portal will be added to permits.cityofboston.gov, with integrations into the following departmental pages and sites:

- Inspectional Services Department (primary deployment)
- City of Boston website (links / banners)
- Department of Neighborhood Development (links / banners)
Boston Fire Department (links / banners)

The following permits will be enabled as a part of the Homeowner Portal:

Phase II-Homeowner Portal		
Tier l	Tier 2	Tier 3
● BFD Bag Smoke Alarm	● BFD Laboratory Registration	● BFD General Permit

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[1] User-facing page content will be translated into Spanish, Mandarin Chinese, Haitian Creole, Cape Verdean Creole, Vietnamese and Portuguese.

● BFD Construction, Demolition, Renovation	● Fire Escape Affidavit	
● BFD Fire Alarm Installations	● Rental Inspections	
● BFD Smoke/Carbon Monoxide Inspection	● Rental Registration	
● BFD Sprinkler System	● Roof Decks Affidavit	
● BFD Temporary Dumpster		
● Board of Appeals		
● Certificate of Occupancy		
● Electrical Fire Alarms		
● Electrical Low Voltage		
● Erect/New Construction		
● Gas Permit		
● Long Form/Alteration/Change of Occupancy		
● Plumbing Permit		
● Short Form Bldg Permit		
● Sidewalk Deposit		
● Use of Premises		

Phase III - Building Professional Portal

Overview

The third implementation phase will be a version of the Accela/OpenCounter Service that includes, in addition to the Business Portal and Homeowner Portal, a licensing and permitting portal for building industry professionals ("Building Professional Portal").

The Building Professional Portal will use content from ISD, BFD, BRA, DND, BHA, PWD, and BTD to create a streamlined permitting and licensing experience for construction industry professionals.[2]

Unlike the Business Portal or Homeowner Portal–which are designed for use by citizens who may be unfamiliar with public sector permitting processes–the Building Professional Portal will be optimized for contractors, architects, real estate developers, electricians, plumbers and others in the building trades who have a higher level of knowledge of existing government processes, and who interact with the relevant departments on a more regular basis. The Building Professional Portal will allow these Permit Applicants to navigate to and apply for specific permits, rather than guiding them through a wizard experience. It will also

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[2]

 User-facing page content will be translated into Spanish, Mandarin Chinese, Haitian Creole, Cape Verdean Creole, Vietnamese and Portuguese.

include a robust user dashboard that allows professionals to track a greater number of active projects and print issued permits.

The Building Professional Portal will include a "Teams Module" that will allow prospective business owners and homeowners to invite building professionals into their projects. Through integration with the Accela/OpenCounter Construct API at the Commonwealth Department of Professional Licensure, the Teams Module will allow for verification of building professional licenses. Once invited, building professionals will have the ability to submit and review specific applications on behalf of the project owner. During Phase III, the invitation functionality will be incorporated into both the Business and Homeowner Portals.

The Building Professional Portal will also include integration with ProjectDox, so that building professionals can interact with ISD staff during the plan review process.

The following permits will be enabled as part of the Building Professional Portal[3]:

The Building Professionals Portal will replace the City's "Dynamic Portal" and will be added to permits.cityofboston.gov, with integrations into the following departmental pages and sites:

- Inspectional Services Department (primary deployment)
- City of Boston website (links / banners)
- Boston Parks and Recreation Department (links / banner)
- Department of Neighborhood Development (links / banners)
- Boston Fire Department (links / banners)

The following permits will be enabled as a part of the Building Professionals Portal:

Building Professional Portal		
Tier 1	Tier 2	Tier 3
● Gas Permit	● BFD Laboratory Registration	● BFD Abandon Underground Storage
● Long Form/Alteration/Change of Occupancy	● BFD License Registration Cert	● BFD Alter Stationary/Portable Combustion Engines
● Plumbing Permit	● Certificate of Inspection	● BFD Alteration of Fuel Oil Burn
● Short Form Bldg Permit	● Facade Affidavit	● BFD Application Tank Removal
● Sidewalk Deposit	● Fire Escape Affidavit	● BFD Asbestos Removal
● Use of Premises		● BFD Blasting Permit
		● BFD Cutting, Burning, Welding

3

		• BFD General Permit
		• BFD Install/Modify Underground Storage
		• BFD Maintain Underground Storage
		• BFD Special Effects/Fireworks

Phase IV - Special Events Portal

Overview

The fourth implementation phase will be a version of the Accela/OpenCounter Service that includes, in addition to the Business Portal, Homeowner Portal and Building Professional Portal, a licensing and permitting portal for special events ("Special Events Portal").

The Special Events Portal will use content from the ISD, BFD, BRA, PWD, and BTD to provide event organizers with an overview of the costs, timelines and requirements associated with holding a special event (temporary installation, parade, block party) in the City.[4]

Permit Applicants will be guided through a permit discovery process that is tailored to their specific permitting needs, based on information that they have supplied to the system. The Special Events Portal will reveal the permits required for the physical location of the event, temporary building permits required for staging, grandstands or tents, as well as temporary/one-day permits for food service. At the end of the process, applicants will be prompted to submit an application for the triggered licenses and permits (and pay via InvoiceCloud). Once submitted, OpenCounter will push the applicant data through the Hansen API to initialize new records in the Hansen system.

As the permit applications are processed, milestone updates will be pushed from Hansen and displayed in the Special Events Portal in an intuitive user dashboard. Milestone updates and alerts will also be delivered via email. Once issued, applicants may print their permits through the Special Events Portal.

In the administrative interface, admin users will be presented with a dashboard of applicant activity, including the number and location of special events, applications submitted, and other relevant indicators of special

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 User-facing page content will be translated into Spanish, Mandarin Chinese, Haitian Creole, Cape Verdean Creole, Vietnamese and Portuguese.

event activity and administrative performance. Administrative staff will have the ability to view individual applications, review permit status, and respond to applicant help requests. They will also have access to content management functionality to customize the Special Events Portal interface. The administrative interface will include a robust user management system that will allow super-user admins to assign roles and responsibilities to other administrative users.

The Special Events Portal will be added to permits.cityofboston.gov, with integrations into the following departmental pages and sites:

- publiceventportal.cityofboston.gov (primary deployment)
- Inspectional Services Department (links / banners)
- City of Boston website (links / banners)
- Boston Parks and Recreation Department (links / banner)
- Department of Neighborhood Development (links / banners)
  Boston Fire Department (links / banners)

The following permits will be enabled in the Special Events Portal:

Special Events Portal		
Tier 1	Tier 2	Tier 3
● BFD Temporary Place of Assembly	● BFD License Registration Cert	● BFD Tent with Assembly
● Electrical Temporary Service	● BFD Place of Assembly	● BFD Use of Candles in a Place
● Emergency Excavation Permit	● BFD Transportation of Hazardous	
● Erect/New Construction	● Food Temporary Services	
● Public Event	● Open Air Parking License	
● Street Occupancy Permit	● Special One Day Alc. License	
● Use of Premises Permit		

Maintenance & Technical Support

Accela/OpenCounter will provide maintenance and technical support for the Accela/OpenCounter Service throughout the term of the contract.

OpenCounter will provide in-app support for real-time assistance for City staff while maintaining help.opencounter.com as its knowledgebase for City Administrators. support@opencounter.com will be monitored on a 24/7 basis, with telephone escalation to a dedicated phone line during business hours (9 a.m. to 5 p.m. Eastern) Resolution of reported issues shall be handled in accordance with the Service Level Agreement.

Maintenance and Technical Support includes monthly project oversight schedule with DoIT project staff to review changes to permitting and licensing regulations, and related updates to the Boston Permitting Portal content. All content updates will be translated into the six supported languages – Spanish, Mandarin Chinese, Haitian Creole, Cape Verdean Creole, Vietnamese and Portuguese – to ensure that the site stays up-to-date across localizations.

Maintenance includes remediation of errors, bugs and inconsistencies according to the following Service Level Agreement:

- **Critical**: The defect affects critical functionality or critical data. It does not have a workaround. Example: Unsuccessful installation, complete failure of a feature. Full resolution will be provided within twelve (12) hours of the notification

- **Major**: The defect affects major functionality or major data. It has a workaround but is not obvious and is difficult. Full resolution will be provided within one (1) business day of the report.

- **Minor**: The defect affects minor functionality or non-critical data. Full resolution will be provided within three (3) business days of the first report.

- **Trivial**: The defect does not affect functionality or data. It does not even need a workaround. It does not impact productivity or efficiency. It is merely an inconvenience. Example: Petty layout discrepancies, spelling/grammatical errors. Full resolution will be provided within three (3) business days of the first report

Maintenance also includes automated PCI network scans (performed by an accredited, third-party scanning service) that will be performed on a weekly basis throughout the term of the contract. Failing tests will be resolved within three (3) business days.

PROJECT TIMELINE

The estimated term of this project is (36) months from the signing of the contract, with four 6-month phases and 12 months of ongoing maintenance and support:

Phase	Milestone	Implementation Date

Phase I-Business Portal	Begin work on portal and deploy boston.zoningcheck.com and boston.zoning.io	04/01/2015
	Deliver wireframes	04/31/2015
	Deliver interface designs	05/29/2015
	Beta launch of Portal	08/01//2015
	Public launch of Portal	08/31/2015
	Post Launch – Product Iteration & Enhancements	09/01/2015 – 09/30/2015
Phase II-Homeowner Portal	Begin work on Homeowner portal	09/01/2015
	Deliver wireframes	10/14/2015
	Deliver portal design	11/18/2015
	Beta Launch of Portal	12/16/2015
	Public Launch of Portal	01/29/2016
	Post Launch – Product Iteration & Enhancements	02/01/2016 – 02/29/2016
Phase III-Building Professional Portal	Begin Work on Building Professional Permit Portal	02/01/2016
	Deliver wireframe	03/16/2016
	Deliver portal designs	04/21/2016
	Beta launch	06/08/2016
	Public Launch	07/29/2016
	Post Launch – Product Iteration & Enhancements	08/01/2016 – 08/31/2016
Phase IV-Special Events Permit Portal	Begin Work on Special Events Permit Portal	08/01/2016
	Deliver wireframes	09/14/2016

	Deliver portal designs	10/19/2016
	Beta launch	12/14/2016
	Public Launch	01/31/2017
	Post Launch – Product Iteration & Enhancements	02/01/2017 – 02/28/2017

Project Assumptions

GENERAL PROJECT ASSUMPTIONS

Scope and Timeline
- Scope is based on discovery sessions with Agency prior to the SOW development.
- The list of 68 permits/licenses/certificates to be enabled in the Boston Permitting Portal is based on information provided in Appendix B . As the project progresses, the City may add up to 10 additional permits/licenses at no additional cost pursuant to a no cost change order, as long as such changes do not materially alter the project timeline or involve a material change in the Accela/Open Counter resources contemplated in this SOW. If an additional change or addition is requested beyond 10, Accela/OpenCounter shall provide a cost or no cost estimate by submitting a change order which is subject to mutual agreement by both parties prior to commencement.
- The City and Accela/OpenCounter will review their responsibilities at the commencement of each of the (4) project phases to ensure that Services can be satisfactorily completed and in the appropriate timeframe.
- The Boston Permitting Portal will require a high degree of integration with existing back office systems. Agency will make every reasonable effort to expose such services to Accela/OpenCounter in the requested format, and to ensure that the services offer the functionality required by Accela/OpenCounter for a successful integration. Agency acknowledges that a failure to provide such functionality may limit the features and functionality of the Accela/OpenCounter service, and may adversely impact the overall implementation timeline.
- "Go live" (system is in production) timeline assumes timely completion of City deliverables, availability of key Agency resources, and collaboration and availability of any third-party vendor resources. Late (per mutually agreed project plan) City deliverables may adversely impact the overall implementation timeline.
- The Project will be managed through Basecamp

Training

The goal of the project is to build a Permitting Portal that will be easy for citizens to use and for Department staff to administer. To that end, Accela/OpenCounter will offer end user training sessions to educate Department staff on the tools, technologies, and best practices of the various components of the Boston Permitting Portal.

Twelve (12) end user training sessions will be offered as part of the contract. Up to eight (8) training sessions will be offered in person; the remainder will be offered via online video conferences. Training sessions will be 90 minutes each.

The schedule for the training sessions will be determined by Accela/OpenCounter and City project staff. It is likely that training sessions will be offered as part of each Phase of the project, but considering that Accela/OpenCounter will be supporting the product throughout the three-year contract, training sessions can also be offered at the end of the

implementation engagement, in order to ensure that staff are trained on the final version of the software. In-person training sessions will be scheduled in conjunction with planned on-site visits.

A sample training schedule is as follows:

Phase	Format	Date
Phase I	In-person	08/11/2015
	In-person	08/12/2015
	Online	08/26/2015
Phase II	In-person	01/13/2016
	In-person	01/14/2016
	Online	01/20/2016
Phase III	In-person	07/13/2016
	In-person	07/14/2016
	Online	07/20/2016
Phase IV	In-person	01/11/2017
	In-person	01/12/2017
	Online	01/20/2017

Accela/OpenCounter maintains online documentation to explain the functionality of the software. Documentation will be updated to reflect new features and enhancements developed for the Boston Licensing and Permitting Portal. The documentation will be accessible through the following links:

- https://help.opencounter.us
- https://opencounter.us/docs
- http://zoning.io/

Testing
When an implementation milestone is ready for use and testing, Accela/OpenCounter will notify City and City will write applicable end user test scripts if applicable and commence acceptance testing of the implementation milestone, with such assistance and support as necessary from Accela/OpenCounter personnel. The acceptance test ("Acceptance

Test") will be conducted solely for the purpose of demonstrating that the deliverable or functionality performs in accordance with its specifications set forth in the wireframes and interface design documentation which will be jointly developed and agreed to by Accela/OpenCounter and City prior to the Acceptance Test (The Acceptance Test will be in a form mutually agreed upon between the parties, and will be completed within ten (10) business days of the date upon which Accela/OpenCounter informs City that the deliverable or feature is ready for use ("Acceptance Period").

Acceptance
If the implementation milestone passes the Acceptance Test, City will promptly so notify Accela/OpenCounter in writing ("Deliverable Acceptance Form"). If the implementation milestone does not pass the Acceptance Test, City will notify Accela/OpenCounter, in writing, prior to the expiration of the Acceptance Period, specifying in reasonable detail in what respects the implementation milestone has failed to meet the "Acceptance Criteria". Accela/OpenCounter will promptly correct any deficiencies set forth in the rejection, and the City will have an additional Acceptance Period to repeat Acceptance Test. The implementation milestone will be deemed accepted by the City upon the earlier of:
- The issuance of by the City of a Notice of Acceptance
- The expiration of the applicable Acceptance Period prior to the receipt by Accela/OpenCounter of a Notice of Rejection

Each of the foregoing shall constitute "Acceptance".

PROJECT RESOURCING ASSUMPTIONS

City Resourcing
The Department of Information Technology (DoIT) will serve as the project sponsor. DoIT will appoint a project owner ("Project Owner") as the key executive for the project, and a project manager ("Project Manager") to facilitate ongoing project administration.

The Project Owner will be responsible for accepting project deliverables, The number of business days for initial deliverable review shall be no more than five (5) business days. Accela/Open Counter will resubmit for final review within five (5) business days. The number of days for final review for acceptance shall be no more than three (3) business days

The Project Manager will provide access to required data and resources, facilitate calls and meetings with City staff, and provide assistance and support during on-site visits.

The Project Owner and Project Manager will provide timely responses to Accela/OpenCounter's requests throughout the project.

Accela/OpenCounter Resourcing

Accela/OpenCounter has assumed that project team will work off-site. The proposed onsite schedule is in Appendix C.

Third Party Resourcing
Accela/OpenCounter is not responsible for impacts to project timeline created by dependency on Agency third party consultants.

BILLING TERMS

BILLING SCHEDULE:

Invoices will be due upon acceptance of the deliverable by the City, as defined in Section #4, Acceptance Criteria. All invoices will be Net 30 from the date of submission.

Phase	Milestone	Invoice Date*	Amount
Phase I-Business Portal	Deploy boston.zoningcheck.com and boston.zoning.io. Inclusive of Project Management, Initial Content Configuration, Initial Content Localization, Hosting	04/01/2015	$49,500
	Deliver wireframes	04/31/2015	$49,500
	Deliver interface designs	05/29/2015	$49,500
	Beta launch of Portal	08/1/2015	$49,500
	Public launch of Portal	08/31/2015	$49,500
Phase II-Homeowner Portal	Begin work on Homeowner portal Inclusive of Project Management, Initial Content Configuration, Initial Content Localization, Hosting	09/01/2015	$51,875
	Deliver wireframes	10/14/2015	$51,875
	Deliver portal design	11/18/2015	$51,875
	Beta Launch of Portal	12/16/2015	$51,875
	Public Launch of Portal	01/29/2016	$51,875
Phase III-Building Professional Portal	Begin Work on Building Professional Permit Portal Inclusive of Project Management, Initial Content Configuration, Initial Content Localization, Hosting	02/01/2016	$33,875
	Deliver wireframes	03/16/2016	$33,875
	Deliver portal designs	04/21/2016	$33,875
	Beta launch	06/08/2016	$33,875
	Public Launch	07/29/2016	$33,875
Phase IV-Special Events Permit Portal	Begin Work on Special Events Permit Portal. Inclusive of Project Management, Initial Content Configuration, Initial Content Localization, Hosting	08/01/2016	$33,875
	Deliver wireframes	09/14/2016	$33,875
	Deliver portal designs	10/19/2016	$33,875
	Beta launch	12/14/2016	$33,875
	Public Launch	01/31/2017	$33,875
Maintenance & Support	Maintenance, Content Updates, Content Localization Sync, Support, Hosting	02/01/2017	$77,500
	Product Iteration & Enhancements, Security Audit	03/01/2017	$47,500

*NOTE: the dates above reflect the delivery dates outlined in the Project Timeline. If deliverables are accepted by the City before or after the anticipated delivery date, an invoice will be submitted on or after the date of acceptance.

EXPENSES:

- All prices are inclusive of travel and other (ad-hoc) expenses. No additional charges including travel lodging, subsistence, miscellaneous (ad-hoc) expenses and other expenses will be allowed.

PAYMENT ASSUMPTIONS

Price Proposal

Pricing is based on Accela's price proposal response to RFP #EV00001595 for three year project total.

Exhibit 2: Price Proposal, Detailed Breakdown

	Phase 1: Commercial (months 1-6)	Phase 2: Residential (months 7-12)	Phase 3: Special Events (months 13-24)	Ongoing Annual Maintenance & Support	Totals 2 Year	Totals 3 Year
Development & Implementation						
Project Management	$12,500	$12,500	$18,750		$43,750	$43,750
Design	$43,750	$43,750	$56,250		$143,750	$143,750
Programming	$93,750	$93,750	$125,000		$312,500	$312,500
API Integration	$25,000	$25,000	$0		$50,000	$50,000
Content Configuration	$17,500	$17,500	$27,500		$62,500	$62,500
Content Localization	$7,500	$7,500	$7,500		$22,500	$22,500
Subtotal	**$200,000**	**$200,000**	**$235,000**		**$635,000**	**$635,000**
Training & Documentation			$0			
Training - In-Person	$15,625	$15,625	$18,750		$50,000	$50,000
Training - Online	$6,250	$6,250	$6,250		$18,750	$18,750
Documentation	$6,875	$6,875	$6,875		$20,625	$20,625
Subtotal	**$28,750**	**$28,750**	**$31,875**		**$89,375**	**$89,375**
Maintenance & Support						
Product Iteration & Enhancements				$43,750		$43,750
Maintenance	$5,625	$10,625	$31,250	$31,250	$47,500	$78,750
Content Updates	$0	$3,125	$8,125	$12,500	$11,250	$23,750
Content Localization Sync	$0	$2,500	$7,500	$12,500	$10,000	$22,500
Support	$5,000	$5,000	$10,000	$10,000	$20,000	$30,000
Hosting	$4,375	$5,625	$11,250	$11,250	$21,250	$32,500
Security Audit	$3,750	$3,750	$3,750	$3,750	$11,250	$15,000
Subtotal	**$18,750**	**$30,625**	**$71,875**	**$125,000**	**$121,250**	**$246,250**
Total	**$247,500**	**$259,375**	**$338,750**	**$125,000**	**$845,625**	**$970,625**

General

- Invoices are due net 30 of the invoice date.

ACCELA/OPENCOUNTER SOLUTION ASSUMPTIONS

General

- **Access to Technical Infrastructure and Documentation** – It is imperative to project success that the City provide the necessary tools, accounts, and permissions to enable Accela/OpenCounter to access the City's internal network for the purpose of remote installation and testing of on-premises IT resources (if applicable). This access must be provided through industry standard tools such as Virtual Private Network (VPN), or using temporary accounts.

- **Access to Third-Party Technology Infrastructure –** The City integration responsibility includes obtaining permission for level/type of integration from appropriate application vendors (including on premises or cloud/hosted, etc.). The city will insure that Accela/OpenCounter resources have access to Development or Test version of the third party system for interface implementation. See appendix A-Systems Integration and Appendix B Permit Integration Schedule.

- **Access to Appropriately-Formatted Data –** The configuration of OpenCounter is dependent upon access to well-formatted data. Whenever possible, City data will be exposed through REST API. Alternatively, data will be provided in json, xml, csv or sql format. Accela/OpenCounter will not be responsible for converting legacy data into useable formats.

- **Technical Infrastructure**- The Boston Permitting Portal will be hosted on **Heroku.com** and served from **permits.cityofboston.gov.** Should the City decide to terminate the Software/services agreement at any time Accela/OpenCounter will transfer ownership of the Heroku hosting account, and associated accounts and services, to City of Boston.

ADMINISTRATION

Location of Services and Key Contact

Services contracted under this SOW may be performed remotely and/or at the City's on-site facilities as deemed appropriate and reasonable for the successful completion of the Services detailed herein.

Please indicate below the key City contact that will be responsible for Project Management:

Name:	
Title:	
Phone Number(s):	
Email:	

CHANGE ORDERS

In order to make a change to the scope of Professional Services in this SOW, City must submit a written request to Accela/OpenCounter specifying the proposed changes in detail. Accela/OpenCounter shall submit to City an estimate of the charges and the anticipated changes in the delivery schedule that will result from the proposed change in the Professional Services ("Change Order"). Accela/OpenCounter shall continue performing the Professional Services in accordance with the SOW until the parties agree in writing on the change in scope of work, scheduling, and fees therefore. Any Change Order shall be agreed to by the parties in writing prior to implementation of the Change Order.. Standard rates for Accela/OpenCounter resources are noted below. The Change Order Template is attached hereto as Appendix E. No Change Order is effective until incorporated into a formal amendment to the parties' agreement.

Role	Rate
Project Manager	$203.50
Technical Manager	$203.50
Technical Consultant	$203.50
Data Conversion Consultant	$203.50
Business Analyst/Configuration Consultant	$203.50
Training Consultant	$275.00
Executive Oversight	$247.50
Report Consultant	$173.50

Appendix A – Systems Interfaces

Phase	Interface	Description
Phase I-IV	Infor Public Sector Suite 8.3 / "Hansen API"	Push application data from Business Portal into Hansen. Read status updates from Hansen.
Phase I-IV	InvoiceCloud	Process online payments for permit and license fees.
Phase I-IV	Street Address Management System ("SAM") REST API	Geocoding, address lookup and verification
Phase III	Avolve ProjectDox	Integrate plan review submission and status updates into Building Professionals Portal.

Phase III	Accela/OpenCounter Automation API	Verify professional licenses against the Commonwealth of Massachusetts Department of Professional Licensure database.

Appendix B – Systems Integration

Tier	Permit Name	Phase I	Phase II	Phase III	Phase IV
Tier 1	Amendment to a Long Form	X	X	X	
	BFD Bag Smoke Alarm	X	X	X	
	BFD Chemist Certificate Process	X		X	
	BFD Construction, Demolition, Renovation	X	X	X	
	BFD Fire Alarm Installations	X	X	X	
	BFD Smoke/Carbon Monoxide Inspection	X	X	X	
	BFD Sprinkler System	X	X	X	
	BFD Temporary Dumpster	X	X	X	
	BFD Temporary Place of Assembly	X			X
	Excavation Permit			X	
	Board of Appeals	X	X		
	Certificate of Occupancy	X	X	X	
	Electrical Fire Alarms	X	X	X	
	Electrical Low Voltage	X	X	X	
	Electrical Permit	X			

	Electrical Temporary Service				X
	Emergency Excavation Permit				X
	Erect/New Construction		X	X	X
	Gas Permit	X	X	X	
	Long Form/Alteration/Change of Occupancy	X	X	X	
	Plumbing Permit	X	X	X	
	Public Event				X
	Short Form Bldg Permit	X	X	X	
	Sidewalk Deposit	X	X	X	
	Street Occupancy Permit				X
	Use of Premises	X	X	X	X
Tier 2	Bath & Massage Establishments	X			
	BFD Annual Inspection Business	X			
	BFD Annual Permit	X			
	BFD Exhaust Hood for Certified	X			
	BFD Laboratory Registration	X	X	X	
	BFD License Registration Cert	X		X	X
	BFD Place of Assembly	X			X
	BFD Quarterly Inspection	X			
	BFD Self-Service Fuel	X			
	BFD Transportation of Hazardous				X
	Certificate of Inspection	X		X	
	Facade Affidavit	X		X	

	Fire Escape Affidavit	X	X	X	
	Food Services	X			
	Food Temporary Services				X
	Funeral Establishment	X			
	Licensing Board Application	X			
	Licensing Board Change Application.	X			
	Loading Zone Permit	X			
	Newsbox Permit	X			
	Open Air Parking License				X
	Pool/Roof/Ceiling	X			
	Recreational Camps	X			
	Rental Inspections		X		
	Rental Registration		X		
	Roof Decks Affidavit		X		
	Special One Day Alc. License				X
	Swimming Pools	X			
	Valet Parking Permit	X			
Tier 3	BFD Abandon Underground Storage			X	
	BFD Alter Stationary/Portable Combustion Engines			X	
	BFD Alteration of Fuel Oil Burn			X	
	BFD Application Tank Removal			X	
	BFD Asbestos Removal			X	
	BFD Blasting Permit			X	

	BFD Cutting, Burning, Welding			X	
	BFD General Permit	X	X	X	
	BFD Install/Modify Underground Storage			X	
	BFD Maintain Underground Storage			X	
	BFD Special Effects/Fireworks			X	
	BFD Tent with Assembly				X
	BFD Use of Candles in a Place				X
	Counts	43	25	35	15

Appendix C – Proposed On-Site Schedule

Phase	Dates	Task
Phase I-Business Portal	12/01/14 - 12/05/14	Staff Interviews and content collection
	04/15/15-04/17/15	Wireframe and design reviews
	04/23/15-04/27/15	Technical and content review

	05/27/16-06/01/15	Stakeholder briefing
	06/29/15-07/03/15	Launch events
Phase II-Homeowner Portal	06/29/15-07/03/15	Phase II kick-off
	08/10/15-08/14/15	Staff Interviews and content collection
	09/21/15-09/25/15	user interviews and wire frame reviews
	11/16/15-11/21/15	Stakeholder briefings and training session
	01/04/16-01/08/16	Launch Events
Phase III-Building Professional Portal	01/04/16-01/08/16	Phase III kick-off
	02/15/16-02/19/16	Staff Interviews and content collection
	04/11/16-04/15/16	user interviews and wire frame reviews
	05/23/16-05/27/16	Stakeholder briefings and training session
	06/27/16-07/01/16	Launch Events
Phase IV-Special Event Portal	06/27/16-07/01/16	Phase IV kick-off
	08/15/16-08/19/16	Staff Interviews and content collection
	10/24/16-10/28/16	Stakeholder briefings and training session
	01/02/17-01/06/17	Launch Events

Appendix D – DELiverable Acceptance Form

Please acknowledge acceptance by:

A

Sign and fax this document to:

Accela/OpenCounter, Inc.
YOUR NAME
YOUR TITLE
Tel:
Fax:

B

Email this document as an attachment to:

YOUR EMAIL

OR

Date:	
Agency Name:	
Approving Agency Manager:	
Accela/OpenCounter Manager:	
Project Name / Code:	
Contract / Agreement #:	

Agency agrees that Accela/OpenCounter has successfully completed the following Deliverables:

Deliverable #	Source / Reference Details	
	Service Agreement	

Agency agrees that Accela/OpenCounter has successfully completed the Deliverables described above in accordance with the terms of the related Contract/Agreement.

APPROVALS:

Agency Name

Signature

Title

Date

APPENDIX E – CHANGE ORDER

Sample Change Order – Page 1

Project: CO #:
Project Code: Date:
Contract #/ PO #:
Initiating Department:
Initiated By:
Change Category: ☐ Product   ☐ Project   ☐ Contract   ☐ Maintenance

---

PROJECT CHANGE DESCRIPTION/TASK SUMMARY:
1. Log File
    Issue details / scope impact:
    • **Schedule impact**:
    • **Resource impact**:
    • **Cost impact**:

2.
    Issue details / scope impact
    • **Schedule impact**:
    • **Resource impact**:
    • **Cost impact**:

Total Project Schedule Impact:
Total Project Resource Impact:
Total Project Cost Impact:

DISPOSITION COMMENTS:

Disposition: ☐ Approved   ☐ Rejected   ☐ Closed   ☐ See Comments
Date:

SAMPLE Change Order – Page 2